

The Spanish Cinematographic Offer Facing Youth Today and its Perception, Consumer Behaviour and Promotion Codes in The New Social Network Environment



Science

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ABSTRACT

In a context characterised by relevant industrial transformations, technologies and communication, this paper reflects on the vision and knowledge which the young public currently possesses regarding the Spanish Cinematographic offer. Delving deeper into the communication processes related with the communication of films at the same time, suggests new lines of investigation related to the use of social networks by the public which is the target of this study. Doing this, presents the results obtained in an investigation which identifies the essential aspects of present day cinematographic marketing and permits determining the key tools in the design of whatever launch¹.

1. Introduction

This diachronic study of Spanish cinematographic marketing during more than a decade, has permitted us to prove the structural weaknesses of this industry. It is a fragmented sector, drained of capital, and having difficulties with distributionⁱ and with scarce tradition in the promotion of its products.ⁱⁱ At the same time, it has permitted us to be witnesses of new habits of consumption and of certain transformations in the communicative process established between the industry and the young spectatorsⁱⁱⁱ.

The investment in marketing is related to the industrial strength of a cinematography which is fundamentally destined to satisfy the needs generated within our domestic market, as communication beyond our borders is very reduced. Numerous studies carried out from the economic project of communication, based on the theory of internal markets, indicate the competitive advantage which the size of the domestic market supposes and have served to explain the great increase in American cinema^{iv}. However, in Spain, the same as in other European countries, internal demand is weak, and in a general character, is more oriented to maintaining a certain level of activity rather than to satisfying the needs of the national spectator.

"If we take into account the level of production and the number of spectators, there probably exists an excessive production, given that for each million spectators of national cinema at its borders, Spain produces 15 films, while Germany has a ratio of 9, France 3.6 and the United States , 0.5. Also, in a natural year, nearly 80% of producers only make one film and only three (3) in a hundred, film more than four"^{vi}

This situation provokes a double production typology. On the one hand, we find ourselves within a great number of low budget films with an elevated dependence on public subsidies. In this type of productions, the lack of a marketing strategy and communication of the product is constant, and on occasion, the mere fact of its premiere in movie theatres supposes a reward for an effort of titanic dimensions. The appearance of creative low cost budgets brought about by the use of new technologies has permitted isolated cases with a certain level of success, but, these prove to be inefficient when it comes to being converted into a reliable business model. We refer to cases such as *cursiva*^{vii} which has made use of the collective micro-financing crowdfunding or *Carmina o Revienta*^{viii} which bet on breaking the "windows" of exploitation with strategies of day and date release which is to say, a distribution on different screens at the same time.

On the other hand, we find ourselves with a reduced number of productions which do consider from the beginning of the project, the relevance of those aspects related to the necessary communicative process with the potential spectator, and, at

the same, count on resources for their execution. The reasons which sustain these proposals are varied, and we will now mention the three most frequent which should not be considered to be excluding.

On occasion, they are related to the international recognition of their creators, and as one example of this, we can name the works of Carlos Saura, or more recently, those of Pedro Almodovar. In this aspect, it would be convenient to point out as a differential cinematographic marketing fact: The favourable reception on behalf of the professionals of the media towards this type of information which shows a favourable social context, and permits lowering the investment in means, which is fundamental in any marketing plan whatsoever^x. From this perspective, they have been converted into recognisable marques, and therefore, count on a positive positioning for a determined public which increments the value of their films by facilitating whatever persuasive communication and generating a certain level of fidelity in the spectator.

In other cases, the worry about promoting a new project arises from the intention of maintaining the previous commercial successes, or transferring them from the television screen. Examples such as *Aguila Roja*, *Fuga de Cerebros*, or *Tengo ganas de ti*, serve to illustrate these types of projects. Lately, productions oriented towards adolescent audiences which try to take advantage of popular recognition of actors and personages in the world of television have been significant. This is a phenomenon which we can call TV System^z and it has been introduced by production companies which traditionally solely carry out projects for television. Santiago Segura and Torrente saga are another clear example of this type of production, and promotion begins months before filming commences, and the incorporation of situations and personages who are very close to the popular reality of the moment, and which obtain a great deal of media repercussion. These arguments for national success, with previous occurrences with in a determined Spanish Comedy which was criticised by the specialised press, but, having doubtless profitability at the box-office, limits the results of exploitation beyond our frontiers.^{xi}

Finally, we shall mention those productions which from their conception are born with a clear international^{xii}, vocation, for a mainstream culture^{xiii} and with a budget which is significantly higher than average. Titles such as *Agora*, *Lo imposible*, *Planet 51*, or *Tadeo Jones* have counted on the necessary financing for designing a strategy proper to marketing with an important publicity campaign, although still a long way off in its comparison with the super-productions of Hollywood. Their results and degree of recognition in the domestic market are highly satisfactory.

The Spanish Cinematographic Industry has a structure which

operates on three fronts. One front, being that of the creators, looks for attractive content for the audience. In second place, our cinema struggles for the time and potential public investment which economically encourages this activity, and which is closely connected to cultural policies. For these three fronts, the knowledge of the tastes which impules the behaviour of the spectator turns out to be a priority, and, in consequence we will describe some of the particular reasons which justify the necessity of delving deeper into this type of knowledge for each of the same.

- A) For the creators: Know the content, genre, or personages which have a greater acceptance which permits them to estimate the weaknesses and strengths of its proposals and also acquire conscience of the efforts or facilities which they will find to develop their projects.
- B) In a society with multiple leisure time offers, the formulas of consuming are more and more diverse. The new formulas of entertaining do not do away with the old ones, and this implies a more intense struggle between the different forms of consumption which cohabit in the leisure time offer. Historically, a movie theatre has been the first form of film sales; and where, the biggest part of their profit was earned. "But, since the middle of the 80s, the earnings obtained from the sale of film licences in the secondary markets (Television, Cable, Home video) have jointly surpassed the profits of premieres in movie theatres."^{xiv}. The decline in consumption of cinema in movie theatres is a worldwide phenomenon, and, in the particular case of Spain, the income figures during the first semester of 2013^{xv} show us that they are at an historical all-time low. On the other hand, it is pertinent to point out the global tendency to generate a new "window" of exploitation surrounding the digital business and that of Video on Demand (VOD), using internet as a distribution channel. Companies like Netflix or Hulu on an international level, and Filmin or Wuaki in the case of Spain, are bets for this new form of commercialising. The follow-up of concrete cases permit us to see the existence of the diverse public for different simultaneous screens which act in a complementary manner. The documentary *Searching for Sugar Man*^{xvi} became, at the same time, a box-office success while it was distributed in a simultaneous manner on DVD and VOD. Nevertheless, we cannot yet speak of a new implantation of a model of global exploitation, in part due to the existing technological, economic, and cultural barriers. The habits of consumption need time, and do not necessarily have to correspond to technology. For example, in Europe, the consumption of DVD still is greater than that by means of digital platforms in spite of the investment and the increase in the offer which has been produced in recent years^{xvii}.

However, the premiering in continual session movie theatres continues to be fundamental, as the results influence the commercialisation in the rest of the "windows" of exploitation in a very determining manner.

- C) In the area of Europe, the concept of Culture has suffered a noteworthy mutation, coinciding with a new consideration with the function of the State in the protection and distribution of whatever artistic works. The inclusion of cultural practices in a organised economic combination^{xviii}, legitimises a general discourse about marketing and cultural properties/goods as one more element among a group of properties/goods and services which defines present day lifestyles^{xix}. This thinking determines the cultural policies and increments the expectations for obtaining economic results and reputation without forgetting other capital aspects related to the diffusion of the signs of identity of a determined culture. The strategies of communication and marketing are affirmed as essential in trying to attract a number of citizens who justify the Public Funds investment that was made^{xx}, moreover, in a sector which is object for study and where the boundary between art and business have always been vague.

The tangible products satisfy needs which are easier to delimit

than those offers, as occurs in the Cinema in an intangible character. The handling of abstract concepts which are difficult to quantify, connected on occasion to sentiments, form an essential part of the ideas which are articulated in promotion campaigns. Also, it convenient not to forget the proper specificity of any marketing action related to culture, where the product does not have to be adapted to the consumer, but rather, that its function is to make it more comprehensible and attractive.

Cinematographic marketing can be considered as intensive; concentrating its major investor efforts in dates nearer to the premiere of the film. Although, with the appearance of communication in social networks, a communicative movement is generated online which looks for the generation of communities of followers which help to amplify contact with the audience, and, reinforce the communicative strategy at the moment of the premiere, and also, manage to maintain a minimum of social presence which favours the new possibilities which permit "long tail" distribution. The reduction of exploitation times in the different "windows" of commercialisation try to obtain the greatest number of public in the shortest possible time. This business model, imposed by the international distributors, obeys an increase in the offer of leisure time, and supports the technique of sampling and estimation which permits calculation of the foreseeable audience from the day after the premiere, and the response it provokes in the population^{xxi}. This formula of distribution makes a strong investment in copies indispensable, and it becomes converted into an entrance barrier for those films of minor budgets. It also obliges considering the premiere date in relation to the other offers which he converted into direct competition as they look for a similar positioning in spectators.

But, the difficulties do not stop there. The distribution sector finds itself facing an uncertainty provoked by the vertiginous technological changes which bring about new markers of consumption. Facing this scenario, the only solution is to be prepared, and for this: "Companies have to develop the necessary abilities to understand the signals which the market sends them (...). Sometimes, listening produces a certain kind of vertigo because it can be perceived as a threat for the traditional manner of working. But, it is a great opportunity, (perhaps the greatest), because it permits the strategies to be reinvented."^{xxii}

In this context, observe the reactions of the spectator in front of whatever process of reception of the messages, or of the search for information related to the launch of a films, should be converted into a priority, because it permits planning the most effective communication with the resources which are available, and, in a special way discover new business opportunities brought about by the use of new technologies. The possibilities of application of the new statistic techniques in search engines and special networks open a new field for the analysis of data with a predictive purpose on the effectiveness of promotional campaigns and the estimation of income^{xxiii}.

In this work we present the results of a never-before-seen investigation carried out on Spanish cinematographic production which premiered during 2012, and the level of consumption and degree of knowledge of the same, which young spectators have.

We are trying to get closer to the behaviour of the spectator from the perspective of those factors which traditionally are managed from the area of marketing. We are referring to, among other aspects, to the perception of the product, the sensibility towards the entrance price, the acceptance of the new forms of distribution, the usage of illegal practices, and, in a special manner, to the promotional communication. In this section we will identify the most effective communicative tools and the use of social networks as a bidirectional vehicle of communication being used not only as prior information for taking decisions on the offer, but also, for the prescription of the same.

2. Objectives and Methodologies

The principal objective of the investigation was to establish an approximation of opinions, beliefs, and intentions of consumption of the young people from Madrid towards the cinemato-

graphic offer produced in Spain. The selection of the young public, concretely, between 18 and 25 years of age, became determined fundamentally by two aspects: The ability to compare results with investigations initiated over a decade ago, and have an impact on that public, which goes most frequently to movie theatres, according to all the data obtained from official sources on habitual consumption.^{xxiv} This collective, as well as constituting the principle cinema consumer group, is at the same time that which presents a greater degree of interest for the 7th art, and the Community of Madrid's rating is higher than that of the national average.

The importance of a juvenile public for the cinematographic industry has been reflected since the first studies which George Gallop realised from his company, Audience Research Institute for the Hollywood studios at the end of the decade of the thirties in the past century. A young man named David Ogilvy, who joined the project, detected the importance of this market, and changed the perception of the industry.^{xxv}

We have designed an investigation which attends to the qualitative and quantitative questions. A questionnaire of 20 questions was answered by 1,420 young people during the months of February and March, 2013^{xxvi}. The election of this period was due to the search for a favourable high profile media context, which is why it was chosen to coincide with the presentation of the Goya Awards; as this was a situation which contributed to a greater amount of information about the works and professionals of our cinematography. Two sources of anonymous data collection were used in both cases without appreciating differences, one personal, by means of questionnaires, and by creating a webpage.

In the present media environment, there appear proposals about new strategies in the construction of the image of the organisations which are supported by the social and fragmented nature of the online media. Numerous actors who have contributed to the reputation of the organisations^{xxvii} have seen themselves strengthened since the appearance of the Social Networks. With the end towards adapting ourselves to these new communicative uses which are provoked by continuous technological development, we have increased the number of questions referring to the uses which the spectators make of them. This has permitted us to prove and describe a characteristic process in a moment of transition in which the traditional practices cohabit alongside the invading new formulas of marketing which open new opportunities.

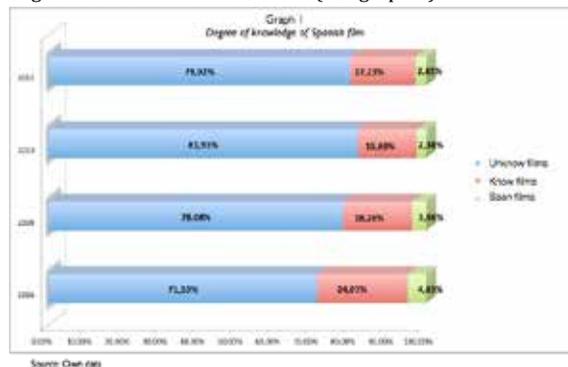
We also consider it opportune, with the end of perfecting previous investigations, to incorporate the three groups of independent discussions by both sexes. This has permitted us to delve deeper in the communicative process between the cinematographic process and the public which has been the objective of the study. The meetings in this explorative stage were carried out once the survey was finalised and the data obtained was analysed. This situation permitted us to prove some significant aspects, and, what turns out to be more relevant is to precisely assess the behaviour of this group of consumers; from the moment they have knowledge of a particular film, to its prescription through the social networks.

One of the challenges considered in the investigation was to identify the value and the perception of Spanish Cinema as a recognised marque by the spectator. To do this, 5 categories were structured. The first four were to represent the value of the marque: fidelity, quality perceived, associations, and recognition. The fifth was based on the measurements of the behaviour of the consumer in the market.^{xxviii}

3. Results

To obtain an answer to one of the key questions of our investigation, "Does the frequent spectator know what is on offer at movie theatres?" Before the hypothesis that the majority of the titles were unknown even for such a favourable public, a list with 158 films which could opt for the Goya Awards in 2012, was also included. Those surveyed were asked to indicate which ones

they had already seen, which ones they know, and which ones they did not know. The results are similar to those obtained in previous studies, confirming an elevated level of lack of knowledge and of that which was seen. (See graph 1)



Contemplating the consumer habits reaffirms an attendance to the movie theatres which is higher than the average, with 61,1% going to the cinema at least once a month and of those, 7,63% have the habit of going weekly.

The reasons which motivate choosing a film is fundamentally its plot or topic (30,47%), the director is also an influence (16,08%) and the actors (14,87%) are relative aspects. Within Spanish cinema, the comedy genre (24,02%) and thrillers-suspense (21,345) stand out as favourites as the sampling shows.

The decision to see a particular film, or going to the cinema as a leisure time option entails a previous phase of looking for or receiving information. Only 7,33% say that they decide on the choice of a film in a movie theatre, while the majority look for information on specialised web pages (20,58%) or, recognise taking the decision influenced by seeing the trailer (17,86%) or the television spot (15,70%). There is a significant result in the preference or specialised web pages, while the search for information on the official web page of the film was only used in 11% of the cases. In comparison with the previous works mentioned, it is convenient to point out the acquired relevance from the recommendations received on the social networks (13,63%) and the loss of influence by printed publications; only 5,64% read information in the specialised magazines, and 7,61% consult the film listings in the newspapers.

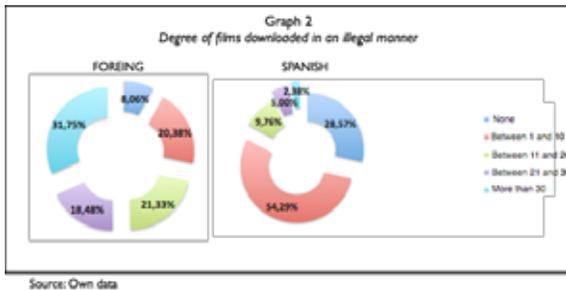
The data has demonstrated a great sensibility to us by this public with regard to variable pricing. 45,43% recognises it as the most influential factor at the moment of taking the decision to go to a movie theatre. Much more so than the proximity of the movie theatre (18,1%), the quality of the projection (14,70%), seeing the film in original version (12,92%), or the film in itself (8,24%). Going deeper into these aspects during the qualitative stage of the investigation, we could clarify its perception on the economic cost, which is influenced fundamentally by two aspects: The reduced budget designated to leisure time, and what is more interesting, the possibility of having access to this same content for free, even though it is illegal. We are dealing with a group of the population which consumes audiovisual content in a permanent manner on other types of screens and formats which on occasion is of low quality, we are referring to videos downloaded on smart phones from such sites as Youtube, which is a situation which makes price more important than quality.

In spite of the high level of familiarity with new technologies, people prefer to buy their tickets at the cinema box office (85,52%), and only a reduced group (14,03%) admit to having done so by internet occasionally in the past year, and principally through such sites as Ticketmaster or Entradas.com (10,69%) rather than in the electronic ticket dispensers in the cinema itself (3,34%). The use of IT applications for mobile telephones for this purpose turns out to be insignificant.

As well as the low level of viewings in Spanish movie theatres, and as we are dealing with a public which is very sensitive to

prices, the results obtained by other types of channels of distribution are not very positive. 71,80% declares they have not legally downloaded a Spanish film in the last year. This figure drops to 56,87% for other films of any other nationality, and in consequence, almost half of those surveyed (43,13%) have used this type of viewing in a legal manner and a quarter admit to have consumed between 1 and 10 films. The sites most often used for downloading are iTunes (8,63%), Filmin (7,63%), Wuaki (6,02%) and Google Play (5,42%)^{xxxix}.

One of the topics which generated most worry in the industry during the past years has been that of illegal downloading. The producers and creators complain that these practices put the future of the sector in evident risk. The data obtained shows us that the majority recur to these types of practices, but the difference between the illegal downloads or "pirates", and between Spanish films and foreign films is significant as can be seen in graph 2.



Those surveyed were asked for an evaluation from 1 to 5 in an effort to quantify the degree of influence of the habitual tools in whatever marketing campaign and communication. The trailer and the spot with a qualification of 4,18 occupied the first position in an outstanding manner, and in the group interviews all those attending recognised having seen some of these audiovisual publicity messages before going to the movie theatre, which was determinate for the choice. The viewing was carried out in a passive manner by means of contact with the campaign realised in the conventional means or in an active manner searching on internet. As a consequence, it seems opportune to strengthen its access in other elements of the campaign. We refer to the possibility of including quick response codes, known popularly as Bidi codes or by the initials QR, which permits access to an easy download from mobile telephones. The impact of posters, outside advertising, or graphics inserted in the published press on paper, have a minor level of influence. (3,12%), and the potential spectator demands to be able to have access to audiovisual information.

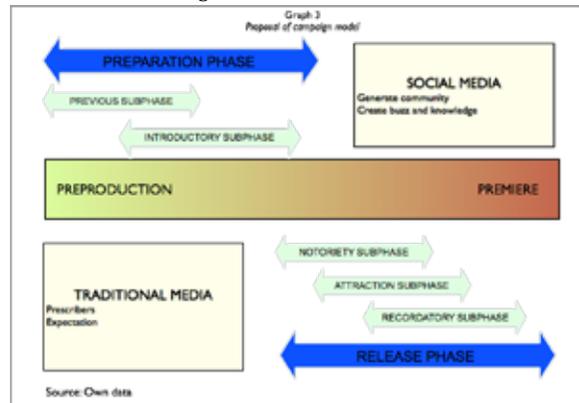
The activity of going to the cinema is usually planned together with other people, and this makes that the comments about this cultural leisure activity are numerous and habitual in the social networks. Perhaps the major change produced in comparison with the investigation published in 2009 is the massive use of the social networks for part of the sampling. The majority of those surveyed affirm that they possess their own profile on a social network which ended up being 94,06%. Twitter (31%), Whatsapp (29,02%) and Facebook (26,22%), are the most used with connectivity by means of mobile telephones greater than that of a personal computer. The network called Tuenti (5,59%), is considered by these users as a younger public's network. All the members of the three groups under discussion recognise having received opinions from members of their groups about a film in the past month and by the same token, have placed their opinions two hours after having been to film's projection.

The knowledge of a particular title is put into motion principally in an indistinct manner in both forms. On occasions, it begins with a screening of audiovisual material on conventional means, trailer or spot. Also, it is produced by a comment or recommendation by some member of a social network. Once a title is known, a search for information is begun, giving priority to audiovisual content through search engines (42,72%), of the profiles created by the producers or distributors on social networks

(22,45%), or on blogs and video blogs having cinematographic themes (20,87%). From these results, the need arises for designing a campaign which uses trans-media messages, given that the contents are divulged indistinctively in conventional means, and in new platforms, supports or channels.

The potential spectator demands a rapid access to information, deciding when he or she wants to accede, and until what point he or she wants to delve into. This new environment in its totality obliges the creators and distributors, to think about new strategies in social networks from the beginning of the work, but, at least at the present time, it would be an error to consider them as perfect substitutes for traditional strategies. They should be understood as a relevant and complementary element which permits incrementing the identification of the public and facilitates the consecution of the proposed objectives^{xxx}.

We can structure these results by means of their representation in a sequential form, in different phases and sub-phases (see graph 3). In this graph there is an influence on the character of prescription and expectation which provide the traditional publicity media and sociability supplied by the content, conversations and comments generated on the social networks.



With the finality of completing this part of the investigation, it has seemed interesting to us to include in a visual manner one of our hypothesis about the design of publicity campaigns nowadays (see graph 4). We have called it "The Theory of Publicity Insemination" and, it has served us to explain the communicative process with the user in this new environment in our teaching activity. Notwithstanding the increase in social media, the triggering of this process is initiated with a contact with the traditional media, and this helps to know a new product or service, which, in our case is the knowledge about a film. Later, if this helps to generate expectation, there begins an interaction by means of an exchange of opinions and comments on the social networks which determine the decision about the showing of the film.



Source: OWN DATA

Finally, before taking on the final conclusions, we point out the results extracted during the qualitative stage about one of

the principle objectives of the investigation, namely, the Spanish cinema marque. Associated positive values have not been detected in the national production as a marque. A certain recognition and fidelity for some directors and determined actors with an achieved social notoriety by means of television is shown, however.

4. Conclusions and future lines of investigation.

One of the most relevant pieces of data that the study shows is the elevated degree of the lack of knowledge that such a specific and favourable public has of a great part of the cinematographic production. Although the knowledge of a film does not guarantee, evidently, its consumption, we can observe how the majority can not be considered as a leisure option due to the ignorance of its existence.

As a result of the data obtained, we now go on to enumerate three aspects which contribute in a direct manner to the degree of recognition of a film:

- a) The participation in the production of the television channels in a direct manner or anticipating the broadcasting rights. This, therefore, multiplies the appearance of information about the film on their programmes and favours the massive spread of its marketing actions.
- b) The presence of international distributors which incorporate the necessary investment in publicity and public relations in their projects.
- c) The existence of actors and personages who have a television repercussion. In spite of the positive cultural connotation which the majority of cinematographic productions possess, and, the critiques received by the television media, the cinema has lost part of the social repercussion of its actors in the benefit of television. Only a reduced number of directors are able to be maintained as a publicity tactic.

The repercussion of the legislative measures of the promotion of cinematography adopted during the last decade do not appear to have managed to obtain greater solidness in the industry, nor a greater perception of the Spanish productions on the part of the young public. Without a clear competitive strategy on an international level, Spanish cinema will continue depending on public funding and its chronic maladies will also continue. There are not sufficient resources to compete with other more solid cinematography offers, but its nonexistence is fundamentally due to the lack of internationalisation of its projects.

The marketing decisions are relevant from the conception of the project, the selection of actors, or the elaboration of a production plan should consider the necessity of generating content from the expectation phase. Without doubt, the most recognised promotional tools by the spectator are the trailer and the publicity spot, therefore being able to be considered as indispensable. We are dealing with a public which is accustomed to audiovisual messages, and therefore, whatever content generated should preferentially opt for this type of language.

We can not speak of a Spanish cinema marque. The spectators do not recognise the four values which any marque gives: positive recognition, fidelity, perceived quality and association with positive values whether they be tangible or intangible.

We have identified a consumer who finds himself or herself, permanently connected to a mobile device and who demands an instantaneous and constant access. The possible interest in this type of works lies in its capacity to understand and explain new processes in the taking of decisions and discover new habits according to which people compile information on the Net before expressing their thoughts in a concrete action in the real world. At the same time, it determines some of the key aspects of a marketing campaign on the present scenario where traditional practices to prescribe cohabit and where there appear new forms of socialisation which undertake to generate a community around a product or service.

The majority of spectators give more value to the opinions of

their friends and to the comments of the consumers than those received by professional critics. The relevance of these recommendations permits opening a future line of investigation based on these recommendations which the users themselves carry out on the distribution platforms such as Netflix or Filmin and their capacity to estimate the consumption of a particular film by converting themselves into advanced indicators of behaviour.

Lastly, another area of investigation which also is of great attraction is found in relation to the opportunities which are generated by the new channels of distribution by internet for the cinematographic industries, such as the Spanish which has scarce relevance for the oligopoly of the existing distribution in the analogue era. The reduction of costs and the access of a global potential audience could promote the profitability of its broadcasting by taking advantage of the alternative market niches. But, if one of the subjects pending to be dealt with by our cinema has been promotion and marketing, they still are made more important on the Net by the exponential multiplying of content. This is an authentic challenge.

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